



PAYROLL &
TEAM MANAGEMENT

Toast Payroll & Team Management User Guide: Asset Management



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What are Assets?

Assets can be used in Toast Payroll & Team Management to track employee assets that have been assigned out to employees upon hire. The customer is able to set up Assets, while also maintaining the ongoing process of updating and adding assets to employee profiles by navigating the employee profiles in the database.



Asset Management

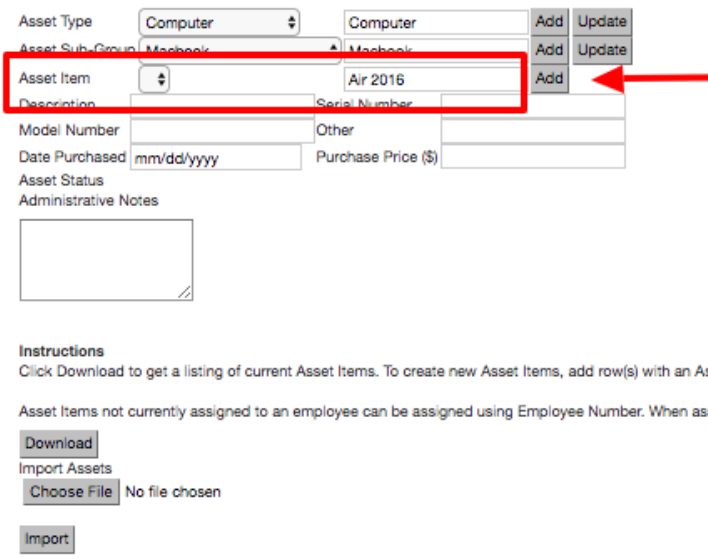
In order to set up the Assets in Toast Payroll & Team Management, you will first need to set up the Asset type, groups and items under the setup page.

The Asset Management page will show any company assets that have been assigned to employees and entered for tracking purposes. This can include things such as company phones, keys, uniforms, computers, etc.

To set up Assets, start on your Toast Payroll dashboard and press both ctrl (PC) / control (Mac) and the letter J to pull up a search menu. Search for and select "Master Asset Management".

Creating Asset Types

Once on the Asset Management tab, you can enter in the Asset specific information. You can also import asset types and assign out to employee using this page.



To add an asset, follow the below instructions:

Add in the Asset Type Name (i.e. computer) and select *Add* for this to be added in the dropdown list. Refresh your page for this to populate.

Add in the Asset Sub Group (i.e. Macbook) and select *Add* for this to be added in the drop-down. Refresh your page for this to populate.

Add in the Asset Item (i.e. Macbook 2017) and select *Add* for this to appear in the drop-down.

Enter in the Model Number (if applicable) and the **Serial Number** (if applicable). Enter in the date purchased and the purchase price (if applicable).



Importing Assets: To import assets, you can select the 'Download' file at the bottom of the page. The file will contain the file formatting for importing assets. Once the information has been entered in the file (must be saved as CSV) select the file you would like to import and select the 'Import' button for this to be imported into employee profiles.

Managing Employee Assets

Once the Asset types have been created on the setup page, you can navigate to the employee's profile in order to assign an Asset (if the import has not already been done for assets).

To navigate to an employee's asset page, select their employee profile in Toast Payroll & Team Management. Navigate to their *Asset & Expense tab > Assets Management*.

Name	Type	Description	Issue Date	Serial Number	Returned?	Attachment(s)	
No Records Found.							

Add Asset

Use this screen to assign Assets to this New Hire.

Action Type Issue Asset

Asset Type

Asset Sub-Group

Asset Item

Description

Serial Number

Model Number

Other

Date Purchased

Purchase Price (\$)

Notes

Date Issued *

Condition Of Asset *

Upload Document No file chosen

Any current assets will appear in the employee's asset overview. To add a new Asset, select the *Add* button on the right-hand side of the page.

Select an Asset Type from the dropdown menu and select a sub-group and Asset Item as applicable (this will populate based on what was entered in the setup page)

Description, serial number, model number and date purchased and purchase price will populate based on what was entered on the company setup page.

Add any notes associated with the new Asset.




- The Upload Document field is a place to upload any supporting documentation that applies to the asset. It is not required.
- The Date Issued and Condition of Asset are required fields.

Select *submit* once the fields have been selected.



Editing an Asset

Click to edit the Instructional Text.

Name	Type	Description	Issue Date	Serial Number	Returned?	Attachment(s)
Air 2016	Computer	Computer purchased at apple store	07/25/2017	99999	Current	  

If you would like to edit the asset, select on the Edit pencil on the employee's Asset page to update information as necessary. Once in the edit section of the Asset, the employer will see the Audit trail at the bottom of the assigned asset. Once an Asset number has been assigned to an employee, a client will not be able to assign that same asset (with serial number) to that employee.

Asset- Edit

Click to edit the Instructional Text.

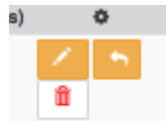
- Asset Type: Computer
- Asset Sub Group: Macbook
- Asset Item: Air 2016
- Description: Computer purchased at apple store
- Serial Number: 99999
- Model Number:
- Other:
- Purchase date: mm/dd/yyyy
- Purchase Price: \$ 0
- Notes: Adding asset for employee
- Date Issued: 07/25/2017
- Condition: Excellent
- Attachment(s): [Choose File](#)

[Save](#)

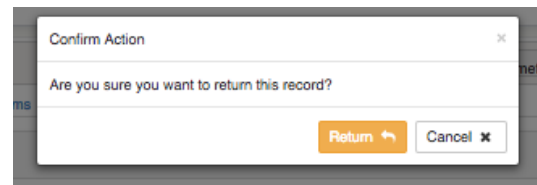
Audit

Item Name	Type	Description	Issue Date	Attachment(s)	Serial Number	Model Number	Other
Purchase Price	Date Returned	Reason For Return	Condition Of Return	Modify Date	Asset Status	Action Type	Notes
Air 2016	Computer	Computer purchased at apple store	07/25/2017	false	99999		
	2017-07-25		Excellent	2017-07-25	Checked Out		Adding asset for en

Returning an Asset

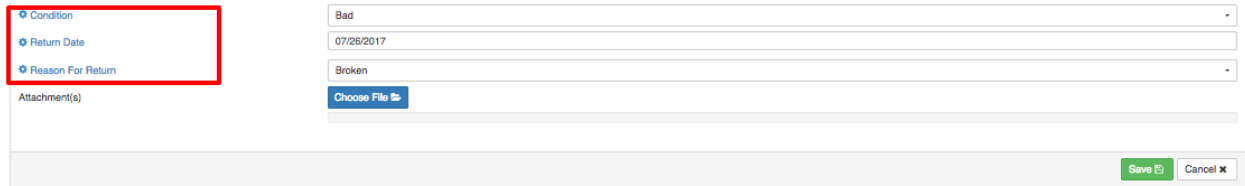


If the employee is no longer using the Asset, you can select the orange Return button next to the asset on the employee's page. Confirm you would like to return the asset.



You'll be brought back into the asset edit page, where you will need to enter in the following information: Condition (in which it was returned), Return Date and Reason for Return.





Select save for this to be updated in Toast Payroll & Team Management.

Termination & Assets

Additionally, clients have the option of collecting Assets when terminating employees in Toast Payroll & Team Management. The Asset step is a part of the termination default template. If the employee has been assigned out Assets, these will populate under the termination template when you arrive at the Asset step.

New Hire Dashboard

Clients can request that the Asset step is included in the New Hire setup. The client will need to add the assigned assets in the Basic Demographics portion of the New Hire process. Once the employee logs in to complete their part of the new hire steps, they will need to acknowledge that the correct Assets have been assigned to them.

Asset Acknowledgement

Please use this screen to acknowledge all assets that you have received.



No Records Found.

Reporting

Clients can either run the Master Asset Item Report to obtain information on what Assets have been created in Toast Payroll & Team Management or generate the Asset Report. These can both be found under the Standard Reports Library under *Company > Report Library > Standard Reports*.

